Tax Education Center

Explore a variety of topics to help clients grow after-tax wealth

Tax-Forward Approach | Tax Tools | Resources

Take A Tax-Forward Approach

Differentiate your practice with these timely topics designed to drive meaningful conversations and help clients keep more of what they earn.

Tax Management Approaches

Tax Treatment of Different Investment Vehicles	NEW	3 minutes
Benefits of Deferring Taxes	NEW	3 minutes
Understanding Tax-Equivalent Yield	NEW	3 minutes
Year-Round Tax Planning, Simplified		2 minutes
The Importance of Asset Location		2 minutes
Why Taxes Matter		2 minutes
Three Ways to Start the Tax Conversation		2 minutes

Novel Ways to Talk About Taxes		2 minutes	→
How Taxes Impact Wealth		3 minutes	→
4 Approaches To Help Reduce Taxes		2 minutes	→
Taxes Matter: 3 Questions to Ask		3 minutes	→
Tax Advantages of Different Accounts		3 minutes	→

Understanding Itemized Deductions	NEW	3 minutes	→
3 Questions for Tax-Smart Planning	NEW	3 minutes	→
Income Taxes: What You Need to Know Now	NEW	5 minutes	→
Understanding the Effective Tax Rate	NEW	5 minutes	→

Tax Advantages of Donor-Advised Funds	NEW	3 minutes	→
Ways to Give	NEW	3 minutes	→
Charitable Donations: Why Choose Stock Over Cash?		2 minutes	→
Three Scenarios Where Planned Giving Can Make a Difference		3 minutes	→
Benefits of Donating Concentrated Stock		2 minutes	→

Charitable Giving: 3 Questions to Ask | 3 minutes

Start the Wealth Transfer Conversation | NEW | 3 minutes

Beyond Taxes: Reasons for Estate Planning | NEW | 3 minutes

Understanding the Estate Tax | NEW | 3 minutes

Know the Core Estate Planning Documents | NEW | 3 minutes

Tax Planning for Life Events | 3 minutes

When to Consider Diversifying Concentrated Shares | 3 minutes

Three Types of Incentive Compensation That Require Tax Planning | 3 minutes

Reducing Taxes on Incentive Compensation | 2 minutes

Restricted Stock Units (RSUs): Incentive Compensation | 3 minutes

Nonqualified Stock Options (NQSOs): Incentive Compensation | 2 minutes

Incentive Stock Options (ISOs): Incentive Compensation | 3 minutes

Investment Concentration: 3 Questions to Ask | 3 minutes

Access Year-Round Tax Tools

Investment Tax Calculator
Determine your combined total tax rate, including federal, state and local taxes, for investment income and gains.

Tax-Equivalent Yield Calculator
Compare yields of in-state muni bonds with out-of-state munis and taxable bonds on a tax-equivalent basis.

Concentrated Stock Position Calculator
See how diversifying your portfolio on a tax-deferred basis may be a better option than a taxable sale.

Laddered Investing Interest Rate Scenario Tool
Explore how laddered portfolios may perform in an environment of changing interest rates.

Charitable Tax Benefit Calculator
See the potential savings in income taxes you could realize by donating cash or appreciated securities.

Explore More Tax Resources From Our Experts

Talking Taxes with Clients
Guidance for framing tax conversations

2024 Tax Information
Rates, schedules and contribution limits

Tax Forward 365® Planner
Timely actions and resources for adding year-round value

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